

## COOPERATIVE FORECASTING GROUP

April 26, 2023

Hybrid Meeting

10:03 A.M. to 11:29 A.M.

## MINUTES

Ms. Deborah Price, Harford County, called the meeting to order at 10:03 A.M.

### 1. APPROVAL OF MINUTES

Ms. Kathleen Comber, Carroll County, moved to approve the minutes from the February meeting of the Cooperative Forecasting Group (CFG), with Mr. Jeff Bronow, Howard County, seconding the motion. The minutes were unanimously approved.

### 2. METHODS FOR CALCULATING HOLDING CAPACITY / LAND USE POTENTIAL: BALTIMORE COUNTY

A holding capacity analysis provides an estimate of the amount of development that can be accommodated in an area, with consideration given to applicable land-use policies and regulations and environmental constraints. Ms. Jennifer Meacham, Baltimore County Department of Planning, presented the methods utilized in calculating holding capacity in Baltimore County.

Baltimore County uses a residential capacity model that determines the potential number and location of additional residential units that could be constructed under existing regulations. It is a parcel based analysis that contains maps and numeric data identifying tracts of land with future residential development potential and the number of housing units that may result under current zoning and development regulations.

The analysis considers the following types of residential development:

- New development on vacant, residentially zoned parcels under conventional review process (vacant parcels);
- New Development on previously developed residentially zoned parcels that have additional potential (underdeveloped parcels).

The capacity model was created using ArcGIS model builder. The model allows for the effects of each step in the process to be discerned and for straightforward data interchanges and rerunning of the model, allowing development capacity figures to be easily updated. The approach used in Ms. Meacham's analysis was to provide an estimated range of potential units based on several factors. First, ArcGIS is used to record the existing land use for each parcel. Next, zoning regulations and historical buildout density are applied to each parcel. Analysis of zoning regulations provides the maximum capacity at buildout, based upon development that is allowed by right through zoning. Historical buildout density affords a more moderate capacity figure and is derived from previous buildout patterns. This results in two values, the first for maximum allowable residential units on a parcel, the second to reflect a reasonable amount of residential units for each parcel defined by previous development trends in the county. Finally, environmental factors are considered for each parcel. If stream buffers or steep slopes are within a parcel, it reduces the number of allowable units in that parcel.

#### Residential Capacity Model Process:

- Code existing land use;
- Identify and calculate yield for standard vacant lots;
- Identify and calculate yield for undersized lots;
- Identify and calculate yield for substandard lots;
- Calculate yield for additional development on underdeveloped land;
- Account for slope impacts on underdeveloped land;
- Account for stream buffer impacts.

The most recent model results estimate that the number of potential units for the urban areas within the county range from 10,890, under the moderate capacity buildout method, and 26,956 units based upon the maximum capacity buildout method. Urban areas within Baltimore County average about 1,300 new residential occupancy permits per year. At that rate, the county could reach build out in approximately 8.4 to 20.7 years, depending upon the method.

Ms. Meacham said they are looking for updated platforms to simplify the process and add additional analysis capabilities.

Ms. Comber asked if the model considers water and sewer capacity, and if there was a limit to the number of floors in buildings on a parcel. Ms. Meacham said they do not directly take water and sewer capacity into account, and that the number of allowable residential units on a parcel is considered.

Mr. Shawn Kimberly, BMC, asked how they determine which set of estimates to utilize in their forecasting process (moderate vs full potential scenarios). Ms. Meacham said they treat it as a range and use a number between the estimates.

Mr. Greg Goodwin, MWCOG, asked how frequently the analysis is conducted. Ms. Meacham said it is done almost every summer.

Ms. Price asked how frequently the county undergoes a comprehensive rezoning process. Ms. Meacham said, once every four years.

Mr. Bronow asked if the data is shared with the school system. Ms. Meacham said that the results are shared with the county's school system.

**[PowerPoint: Baltimore County – Residential Development Capacity Study Presentation]**

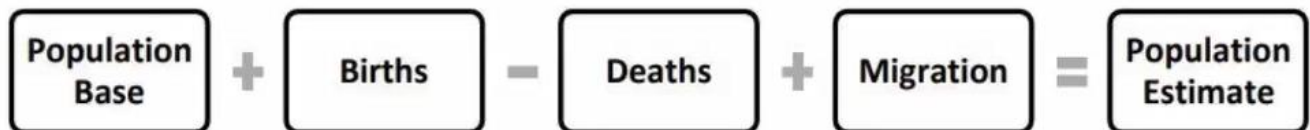
**3. CENSUS BUREAU POPULATION ESTIMATES PROGRAM DATA (VINTAGE 2022)**

Mr. Shawn Kimberly, Baltimore Metropolitan Council, provided a presentation on the Census Bureau's recently released vintage 2022 county-level Population Estimates Program (PEP) components of change data. The primary purposes of the Bureau's annual estimates is for the allocation of funds to state, county and local governments, to set controls for national surveys, and to monitor demographic change. The CFG can use these estimates to monitor demographic change. Between decennial censuses, the PEP figure should be used for the most up-to-date Census Bureau population estimate.

Products Produced by the Population Estimates Program

- Population estimates and components of change (US/State/MSA/County)
- Resident Population by age/sex/race/Hispanic origin (US/State/County)
- Total Resident Population (Sub-county levels including City/Town)
- Housing Units (US/State/County)

For this presentation Mr. Kimberly showed the PEP components of change estimates from vintage 2022 that were released March, 30 2023, and focused on the population change since the last decennial census (April 1, 2020 through July 1, 2022). The image below shows the components of change.



Source: U.S. Census Bureau

During the time-period April 1 2020 to July 1 2022, the nation added 1.8 million people, an increase of 0.6%. Over the same time period, Maryland experienced population decline of about 12,600 persons (or -0.2%), and the region decreased in population by 8,800 persons (or -0.3%).

Within the region, and over the same time period, all jurisdictions experienced positive growth in population, except for Baltimore City (which is estimated to have declined by 15,800 persons, or 2.7%) and Baltimore County (which is estimated to have declined by 8,400 persons, or about 1.0%).

Anne Arundel County lead the region in terms of numeric growth, adding 5,000 persons, a 0.9% increase. The region's smaller jurisdictions (Queen Anne's, Carroll, and Harford counties) led the region in population growth rate over the time-period.

Further analysis revealed that the region's jurisdictions that experienced positive growth over the time-period showed a slowing of growth from 2021 to 2022, as compared with 2020 to 2021. The two jurisdictions experiencing population decline saw an acceleration of decline in 2022 compared with 2021.

Looking at the natural increase component of population change during the time-period, over half of the state's counties had a natural decrease in population (more deaths than births). In the region, Baltimore County, Baltimore City and Carroll County underwent natural decrease, with the remaining jurisdictions experiencing natural increase. Natural change was positive at both the regional (+5,300) and state levels (+20,300).

Mr. Kimberly then explored the net migration component of population change (net domestic plus net international migration) during the time-period April 1 2020 to July 1 2022. He noted that net migration was negative for five of Maryland's largest six jurisdictions (including Baltimore City, Baltimore County, and Howard County in the Baltimore region). Harford, Carroll and Queen Anne's counties had the largest increases in population via net migration in the region. Population growth by net migration for the region was -15,300, and for the state it was -35,000.

The net international migration component was positive during the time-period for all Maryland counties. The state's larger and more urban jurisdictions drew more international migrants than the smaller, rural counties. At the regional level, population growth from international migration was 9,700, and for the state it was 33,300.

Analysis of the net domestic migration component of change showed that seven counties in Maryland experienced net domestic out migration during the time-period, including each of the top six most populous jurisdictions in the state. Four of the region's jurisdictions (Baltimore City and Baltimore, Howard and Anne Arundel counties) experienced domestic out migration. The region's smaller jurisdictions (Harford, Carroll and Queen Anne's counties) experienced positive net domestic migration. Cumulatively population growth via net domestic migration for the Baltimore region during the time-period approximated -25,000. Population growth via net domestic migration for the state of Maryland over the same time-period was -68,300.

Mr. Kimberly then shared a comparison of the 2022 Census population estimates with the CFG Round 10 2022 estimates (interpolated from 2020 and 2025 Round 10 data). At the regional level, the CFG Round 10 estimate is 1.7% above the Census PEP estimate. The

region's three largest jurisdictions (in terms of population) had the greatest disparities from the Census Bureau's PEP estimates in both numeric and percentage terms.

Mr. Bronow asked how membership is viewing the discrepancies between CFG and Census PEP estimates. He noted that he was a bit surprised by the Census Bureau's population estimates for Howard County, based upon the levels of housing unit construction in the jurisdiction. Mr. Bronow explained that he had reviewed the Howard County estimates from the previous decade and found that the estimates program had undercounted population for the jurisdiction by about 4,000 to 5,000, as evidenced by the disparity between the vintage 2020 PEP estimate and the 2020 decennial census population figure. The "correction" to the PEP estimates, provided by the decennial census, indicates that the methods utilized by the Census Bureau in the development of the estimates might be in need of review (based upon the experience from the past decade, 2010 to 2020).

Ms. Comber said that she had a similar observation for Carroll County (regarding PEP estimate undercount compared with the 2020 census). She added that Carroll County might be interested in participating in an update to Round 10 in 2024.

Mr. Sundara noted that the Census Bureau is still using a "blended" base approach (which includes components from the 2010 decennial census) in the vintage 2022 estimates. While the 2020 county level population totals from the decennial census serve as the population base for the estimates, the Bureau has not transitioned to using the detailed age, race, and sex data from the 2020 decennial census to inform the estimates process (as the detailed 2020 decennial census data had not yet been released). Once the transition is made to utilizing the detailed 2020 census data in the development of the estimates, there may be adjustments to the estimates numbers.

***[PowerPoint: U.S. Census Bureau Population Estimates – Jurisdiction Level Components of Change - v2022]***

#### **4. NEW BUSINESS**

Mr. Kimberly announced that going forward, recordings of committee meetings (including the CFG) will be posted on the Baltimore Metropolitan Council website.

Mr. Kimberly asked for a volunteer to present on methods for calculating holding capacity at the next meeting. Ms. Price, Harford County, volunteered to present.

The next CFG meeting will be held Wednesday, June 28. The meeting format will be hybrid. Members can attend the meeting virtually or in person.

The meeting adjourned at 11:29 A.M.

NOTE: The "UPWP Task Draft RFP" agenda item was held in closed session.

## **ATTENDANCE**

### ***Members***

Austin Broderick, Baltimore County Planning Department  
Jeff Bronow, Howard County Department of Planning and Zoning  
Steve Cohoon, Queen Anne's County Department of Planning and Zoning  
Kathleen Comber, Carroll County Department of Planning  
Jennifer Meacham, Baltimore County Planning Department  
Deborah Price, Harford County Department of Planning and Zoning  
Alfred Sundara, Maryland Department of Planning  
James Wilkerson, Howard County Department of Planning and Zoning  
Kristopher Weaver, Baltimore County Planning Department

### ***Staff and Guests***

Charles Baber, BMC  
Jennifer Duffy, Baltimore Development Corporation  
Blake Fisher, BMC  
Greg Goodwin, Metropolitan Washington Council of Governments  
Shawn Kimberly, BMC  
Todd Lang, BMC  
Crystal McDermott, BMC  
Brian Ryder, BMC